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ABSTRACT

Effective management of time involves utilizing a few basic rules. These rules can be summarized as follows: (1) determine your goals and objectives in all major aspects of your life; (2) devote at least 25 percent of your work week to personal improvement in your managerial role; (3) block out a large amount of time daily for planning in your major management areas; (4) know and keep track of where your time goes; (5) prioritize your time to match your high-level objectives; (6) avoid barriers to effective time usage such as interruptions and television; (7) plan for and utilize basic time management tools such as proper delegation, role definition, and secretary development; (8) do not let your time be eaten up by others' demands. (Author/PGD)

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san mateo county office of education

time management

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

EA 010 560

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* IN PROCESS

> *To every thing there is a season, and a time to every purpose under the Heaven.*
>
> *Ecclesiastes 3:1*

TIME MANAGEMENT

by

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Moreover Thou shalt provide out of all the people able men, such as fear God, men of truth, hating covetousness; and place such over them, to be rulers of thousands, and rulers of hundreds, rulers of fifties, and rulters of tens:

And let them judge the people at all seasons and it shall be that every great matter they shall bring into thee, but every small matter they shall judge:

So it shall be easier for thyself, and they shall bear the burden with thee.

Exodus 18:21 and 22

PURPOSE: THE PURPOSE OF THIS BOOKLET IS TO PRESENT THE CONCEPTS AND APPLICATIONS OF EFFECTIVE TIME MANAGEMENT TO THE END THAT YOU, THE READER, WILL BE ABLE TO UTILIZE YOUR TIME MOST EFFECTIVELY, THEREBY ACCOMPLISHING YOUR MOST WORTHWHILE OBJECTIVES IN THE SHORTEST AMOUNT OF TIME.

PROCEDURES: THIS BOOKLET IS DESIGNED TO BE SELF-ADMINISTERING. HOWEVER, THE GREATEST BENEFITS WILL BE DERIVED WITHIN A GROUP SETTING FACILITATED BY A PERSON WHO HAS SOME BACKGROUND IN THE MANAGEMENT OF TIME.

THE MAJOR ELEMENTS OF THE BOOKLET ARE:

A. UNDERSTANDING BASIC CONCEPTS OF TIME MANAGEMENT
B. KNOWING WHERE YOUR TIME GOES
C. PRIORITIZING WHAT YOU SPEND YOUR TIME ON
D. AVOIDING BARRIERS TO EFFECTIVE TIME USAGE
E. BASIC TIME MANAGEMENT TOOLS
F. INCREASING DISCRETIONARY TIME
G. APPLICATIONS
H. REFERENCES

"Time stays long enough for those who use it."

Leonardo da Vinci

"Tomorrow I will live, the fool does say:
Today itself's too late: The wise lived
Yesterday."

Martial

PAGES 2-4 WERE REMOVED DUE TO COPYRIGHT RESTRICTIONS

A. UNDERSTANDING BASIC CONCEPTS OF TIME MANAGEMENT

1. THERE IS LITTLE CORRELATION BETWEEN AN EFFECTIVE MANAGER AND THE AMOUNT OF TIME HE/SHE SPENDS ON THE JOB.

2. THERE IS HIGH CORRELATION BETWEEN AN EFFECTIVE MANAGER AND THE AMOUNT OF TIME HE/SHE SPENDS ON HIGH-PRIORITY OBJECTIVES AND "QUALITY" TIME. (QUALITY TIME = SUFFICIENT TIME IN LARGE BLOCKS AND DURING THE MOST CREATIVE PERIODS.)

3. THE EFFECTIVE EXECUTIVE PLANS AND CONTROLS HIS/HER TIME; THE INEFFECTIVE EXECUTIVE IS CONTROLLED BY EVENTS AND CONSTITUENTS.

4. BE PROACTIVE: NOT REACTIVE.

5. ASSUMING AN AVERAGE WORK WEEK FOR MANAGERS OF APPROXIMATELY 48 HOURS, IT IS GENERALLY CONSIDERED CRITICAL THAT THEY DEVOTE AT LEAST 25 PER CENT OF THEIR WORK WEEK TO INPUT; E.G., ATTENDING CONFERENCES, READING BOOKS RELATED TO THEIR WORK, VISITING OTHER ORGANIZATIONS (E.G., SCHOOLS, COUNTIES, INDUSTRIES, BUSINESSES), ETC.

6. DEDUCTING 12 HOURS (25% FROM THE 48-HOUR WORK WEEK) LEAVES 36 HOURS FOR THE MANAGER TO DEVOTE TO OPERATIONAL RESPONSIBILITIES.

7. IN ORDER TO PLAN EFFECTIVELY, IT IS SUGGESTED THAT THE MANAGER BLOCK OUT ONE OR TWO HOURS PER WEEK FOR PLANNING IN EACH OF SIX CRITICAL AREAS OF MANAGEMENT:

   (A) ORGANIZATIONAL THRUST AS STATED IN GOALS AND OBJECTIVES

   (B) EVALUATION (PROGRAM AND PERSONNEL)

   (C) STAFF DEVELOPMENT

   (D) TEAM BUILDING

   (E) ORGANIZATIONAL SUPPORT BUILDING

   (F) OPERATIONS

8. ONE-TO TWO-HOUR BLOCKS OF TIME ARE SUGGESTED FOR PLANNING BECAUSE A LARGE SPACE OF TIME AT ONE SITTING IS MORE EFFECTIVE THAN SHORT SPACES OF TIME SCHEDULED SEPARATELY.

9. BECAUSE MOST PEOPLE ARE MOST CREATIVE IN THE MORNING, IT IS SUGGESTED THAT THE PLANNING TIME BE SCHEDULED FOR THE MORNING. THIS MIGHT VARY, HOWEVER, WITH ENVIRONMENTAL CONDITIONS OF THE MANAGER'S JOB OR THE PERSONALITY OF THE MANAGER.

10. DEDUCTING 10 HOURS PER WEEK (2 HOURS PER DAY) FROM THE 36 HOURS LEAVES 26 HOURS PER WEEK FOR CRISIS MANAGEMENT AND GENERAL OPERATION; STILL OVER 5 HOURS PER DAY.

B. KNOWING WHERE YOUR TIME GOES

AT LEAST ONE MONTH PER YEAR, EVERY MANAGER SHOULD KEEP OR HAVE HIS SECRETARY KEEP AN ACCURATE RECORD OF WHERE HIS TIME GOES; EVEN THE MANAGER WHO CONSIDERS HIMSELF HIGHLY EFFICIENT IS USUALLY SHOCKED AT THE OUTCOME. THE RESULTS OF SUCH SURVEYS USUALLY SHOW:

1. MAJORITY OF TIME SPENT IN CRISIS RESOLUTION INSTEAD OF PLANNING TO PREVENT CRISIS SITUATIONS.
2. DEALING WITH FREQUENT INTERRUPTIONS WHICH DESTROY PLANNING INCENTIVES AND MOMENTUM.
3. MORE TIME SPENT ON TRIVIA THAN REALLY IMPORTANT ITEMS.
4. IMPORTANT OBJECTIVES RECEIVING LESS TIME THAN UNIMPORTANT OBJECTIVES.
5. THE MOST PRODUCTIVE TIME SPENT ON ITEMS WHICH REQUIRE LEAST CREATIVITY AND PRODUCTIVITY.

> *"You neglect duties, public and private, and satisfy conscience that you have not time to fulfill them all. But the wasted hours cry out against you."*
>
> *Rev. John Todd*

C. PRIORITIZING WHAT YOU SPEND YOUR TIME ON

EVERY MANAGER HAS OBJECTIVES: PERSONAL, PROFESSIONAL, FAMILY, HEALTH, COMMUNITY, SOCIAL, RECREATIONAL, ETC. OBVIOUSLY, SPENDING ALL YOUR TIME ON THE GOLF COURSE OR SKI SLOPES MAY ASSIST YOU IN REACHING A RECREATIONAL OBJECTIVE, BUT IT WILL UNDOUBTEDLY PLAY HAVOC WITH YOUR JOB AND YOUR HOME LIFE. MOST MANAGERS RECOGNIZE THIS BUT FEW REALIZE THAT THE SAME OVER-INDULGENCE OF TIME IN THEIR PROFESSIONAL ROLE MAY ALSO JEOPARDIZE THEIR HOME, FAMILY AND HEALTH LIVES. WHAT IS CALLED FOR IS:

1. SETTING FORTH OBJECTIVES IN EVERY AREA OF LIFE
2. DETERMINING WHICH OBJECTIVES ARE THE HIGHEST-PRIORITY ONES
3. ALLOCATING TIME TO THOSE OF HIGHEST PRIORITY
4. MONITORING YOUR SCHEDULE TO MAKE CERTAIN THAT HIGH-PRIORITY OBJECTIVES CONTINUE TO RECEIVE HIGH-AMOUNT AND HIGH-QUALITY TIME ALLOCATIONS.

"Each day is rich in potentialities. We can either use the passing hours to implement our plans, realize our dreams, strengthen our foundations, or we may treat these hours with unthinking indifference, the moments slipping through our fingers like fine sand on the shore."

"Callisthenes"

D. AVOIDING BARRIERS TO EFFECTIVE TIME USAGE

THERE ARE MANY PITFALLS FOR THE UNWARY MANAGER IN HIS EFFECTIVE USE OF TIME. A FEW OF THESE ARE:

1. Telephone interruptions: Dropping everything to answer the phone even while planning, problem solving, or involved in a high-priority activity.

   - SUGGESTION: When you are in conference, problem solving, planning or any other high-level activity, have your secretary take the message. A "call back" message should contain (a) who called (b) what did they call about (c) a telephone number for your return call and (d) a suggested time for you to return the call.

2. Drop-in visitors: Drop-in visitors from outside the organization such as salesmen, etc. are easier to contain than internal visitors such as your co-workers; however, neither category should be permitted to waste your time.

   - SUGGESTION: Except in emergencies handle all visitors on an appointment basis through your secretary.
   - SUGGESTION: Review suggestions in BODY LANGUAGE books and ASSERTIVE TRAINING books on how to handle unwanted visitors.

3. Excessive paperwork: Excessive dictation, answering every letter yourself, or stockpiling reading material for reviewing at a later date.

   - SUGGESTION: Try not to handle a piece of paper more than once. Write on it, file it, send it on, or whatever; however, just don't put it down to pick up or shuffle through later.
   - SUGGESTION: Purge your files at least annually: It is estimated that you can throw away at least 80% of what you file --it will never be used again.
   - SUGGESTION: Improve reading and listening skills: Don't read every word of every book--read the essence. Don't listen to every word--get the message from word and non-verbal communications.

4. Office traditions: Meetings, meetings, meetings plus inefficient agendas or lack of closure.

   - SUGGESTION: Never hold a meeting if you can achieve the same objective through a memo, a telephone message, or some other communication device.
   - SUGGESTION: Provide an agenda for every meeting which includes the item, the estimated amount of time needed to handle the item and the result wanted on the item.
   - SUGGESTION: Provide minutes to all participants within 48 hours of holding a meeting.

5. Procrastination: I'll put this off until (a) I have more time (b) conditions are better, (c) I feel better, (d) all of these.

   - SUGGESTION: Start: Each difficult task begins with a single one: Once started you usually get into the swing of it and complete the task.
   - SUGGESTION: Reward yourself for getting started or for doing a portion of whatever you are procrastinating.

6. Can't say "no": Always prepared to respond to almost anyone's beck and call even when you know nothing will come of it.

   - SUGGESTION: Take advantage of the suggestions in DON'T SAY YES WHEN YOU WANT TO SAY NO (see bibliography).
   - SUGGESTION: Develop some dialogue statements which you are ready to use when you want to say "no" but don't know how to.

7. Unclear role definition: Maybe you're doing something you think you're supposed to do but the boss can't understand why you're doing it but is too considerate to ask.

   - SUGGESTION: Periodically check with your employer: Jointly reviewing your goals and objectives will provide this reassurance and commitment.

8. Doing low-priority activities: Does it really make a difference if some of those things are done? Can I delegate this activity or part of this activity to someone else?

   - SUGGESTION: Delegate: Assign the least important tasks to others or just forget them. Delegate parts of a task if you can't delegate the entire task.
   - SUGGESTION: Monitor what you delegate.
   - SUGGESTION: Areas to delegate:
     - What you don't like
     - Rewarding tasks
     - What others can do better
     - Parts of tasks if not all

9. Reverse delegation: Permitting your subordinates to delegate their problems to you for action or solution.

- SUGGESTION: Inform subordinates that they should bring proposed solutions along with their prob'ems when meeting with you.
- SUGGESTION: Provide inservice training for subordinates in skill areas needed and in problem solving.

10. General time wasters:

Wasted commuting time.

- SUGGESTION: Catch up on the radio news so that you do not have to read the daily newspapers.
- SUGGESTION: Listen to cassette tapes on areas in which you want to improve your skills or knowledge.
- SUGGESTION: Carrying a portable tape recorder for dictating letters, notes, or ideas to yourself.

Time wasted in waiting: Standing in line, etc.; those unexpected times when the doctor is late or the number of people is excessive.

- SUGGESTION: Carry your own reading matter so that the unexpected waiting period becomes "a gift of time."

Television: One of the biggest wasters of time in the world today. (Also one of the most effective teachers when used properly.)

- SUGGESTION: Limit yourself to the number of hours that you plan to view t.v. during the week or to the events you feel are important for you to see; then turn on the t.v. for those items only.

Bad habits: Doing something becauase you always have or because you're conditioned to do it; e.g., "Let's see what's on the t.v."

- SUGGESTION: Perform tasks just as soon as they are offered.
- SUGGESTION: Remove any satisfaction gained from the habit thereby rendering it unattractive.

  On such items as typing, etc. a deliberate repetition of the undesirable habit will often eliminate the habit.

E. UTILIZING A FEW BASIC TIME MANAGEMENT TOOLS

1. Establish written goals and objectives. You don't know where you're going or when you've arrived nor does anyone else unless you have specific goals and objectives.

2. Develop a plan for each role: Most managers perform several roles. Have a written plan for each role you perform.

3. Manage rather than "do" keeping in mind that you are a manager and obtain results from other people. This will assist you in not "doing" things and keep you on the track of managing the enterprise and the people involved in it.

4. Block out your time: Schedule your time according to the activity. Creative activities need high energy time--probably morning time for most. Telephone calls and letter writing require low energy times. Planning time requires uninterrupted blocks of time of at least one-two hours.

5. Scheduling: Don't schedule every minute of the day - leave room for flexibility.

6. Provide for daily creative time: At least one-half hour daily to cogitate, meditate, and just plain think about who you are, where you're going and how to solve some of those nagging problems.

7. Daily planning time: Plan with your secretary at least five minutes at the beginning of each day. This not only gives you both a chance to check signals but alerts each of you to "special" problems of the day.

8. Conduct periodic problem solving meetings: At least monthly. How are we doing? What can we do better? What is slowing us down?

9. Set deadlines and stick to them.

10. Use a pocket day-timer: List priorities for the day in numerical order; the ones you don't finish become number ones tomorrow. Plan your day - follow your plan.

11. Delegate: Analyze your job. Delegate tasks or activities that (a) are repetitive (b) can be done by others more effectively (c) you don't like to do and (d) will provide job enriching opportunities for your subordinates.

12. Monitor what you delegate.

13. Develop a secretary: A manager and a secretary are a team. Each is essential to effective management but teamness only develops through care and nurturing.

14. Establish proper working conditions: Analyze your working environment for proper control of excessive sound and visual distractions.

15. Establish procedures for correspondence, telephone and visitors.

F. INCREASING SELF-IMPOSED (DISCRETIONARY) TIME BY REDUCING OTHERS-IMPOSED TIME

THERE ARE JUST SO MANY HOURS IN THE DAY. THE TIME OF MANAGERS IS TRADITIONALLY INFRINGED UPON BY MANY FORCES AND INDIVIDUALS AROUND HIM/HER. SOME OF THESE ARE:

1. Boss-imposed time: This time is utilized to accomplish those activities required by the boss. Obviously this is a high-priority because failure to perform may carry direct and immediate penalties.

2. System-imposed time: This includes requests from a managers' peers or other agencies/individuals in the system of which the manager is a part. This does not generally carry immediate penalties but might "catch up with" a manager.

3. Community-imposed time: This may or may not be a great amount of time depending upon the manager's status in the community and community expectation. This probably has fewer direct penalties but really depends upon the culture of the organization.

4. Subordinate-imposed time: Requests from subordinates for time to help them do their job. This can include everything from doing their job for them to holding their hand while they do it.

5. Self-imposed time: This is the time needed to do your own job; e.g., the things for which you are held accountable.

THESE FIVE CATEGORIES, OF COURSE, DO NOT INCLUDE NON-JOB-RELATED TIME IMPOSITIONS SUCH AS WIFE, FAMILY, CHURCH, ETC. BUT ARE PRIMARILY DIRECTED TO JOB-IMPOSED REQUIREMENTS.

THE MAJOR OBJECTIVE IS TO REDUCE ALL OTHER-IMPOSED TIME REQUIREMENTS TO THE LOWEST EFFECTIVE LEVEL AND INCREASE THE MANAGER'S TIME IN THE SELF-IMPOSED OR DISCRETIONARY AREAS.

SUGGESTIONS TO ACCOMPLISH THIS INCLUDE:

1. Developing a boss-peer-self mutual understanding and perception of your position and its role in the organization.

2. Utilize own initiative in relation to boss-and system-imposed responsibilities and report actions to boss and peers. In this way the manager has control over the time and the activity and is exercising the highest level of initiative.

3. Break your activities into elements and ask:

   Can all or part of it be delegated?

   Should it be done at all?

   Can it be done less often?

4. Never accept a subordinate's problems or responsibilities as your own. Leave the initiative with your subordinate.

5. Write to subordinates only when a record of the communication is needed; otherwise use the telephone or a face-to-face discussion.

6. You set the time for any interviews and set them at your convenience; not theirs.

SUMMARY

1. Determine your goals and objectives in all major aspects of your life.
2. Devote at least 25% of your work week to personal improvement in your managerial role.
3. Block out a large amount of time daily for planning in your major management areas.
4. Know and keep track of where your time goes.
5. Prioritize your time to match your high-level objectives.
6. Avoid barriers to effective time usage such as interruptions, t.v., etc.
7. Plan for and utilize basic time management tools such as proper delegation, role definition, secretary development.
8. Increase self-imposed (discretionary) time.

> *"The reason I beat the Austrians is that they did not know the value of five minutes."*
>
> *Napoleon*

> *"You will never 'find' time for anything. If you want time you must make it."*
>
> *Charles Buxton*

APPLICATIONS ⁂

THE FOLLOWING STEPS SHOULD BE TAKEN IN SEQUENCE. THE APPENDIX CONTAINS EXAMPLES OF COMPLETED FORMS FOR ILLUSTRATIVE PURPOSES ONLY. YOU WILL UNDOUBTEDLY FIND YOUR TIME SCHEDULES, GOALS, OBJECTIVES, AND PRIORITIES DIFFERENT THAN THE EXAMPLES.

Step 1: Complete the Epitaph by describing those qualities about yourself that you would like to have placed on your gravestone. (Use Epitaph sheet, Page 19.)

Step 2: On the form labeled "ROLES" rank the 7 roles in order of their importance to you today. Start with #1 rank as most important. (Self Service is not ranked to avoid controversy over "self preservation")

Step 3: Identify in single statement, 3-4 general goals in each of your seven roles which you would like to achieve in the next five-year; one-year periods. Next take these general goals and identify six-month and one-month objectives by which you can measure your progress toward reaching your goals.

Step 4: Identify those activities you now associate or would like to associate with each role by writing the activity in the next column. Some activities will overlap categories. Assign according to the major value area.

Step 5: Next design a model plan for your coming seven days, according to your role priorities listed above. Do not schedule activities too tightly, but rather by major blocks of 1-2 hours in order to achieve something meaningful. Leave gaps for travel, recreation, refreshment breaks, and other "islands" that your require.

Step 6: Review your long-range goals and your short-range objectives and revise your model weekly time plan to reflect what you want to accomplish. Don't forget your 1-2 hour planning time blocks and your one-half hour creative time period on a daily basis in your work.

⁂ ADAPTED FROM CENTER FOR EDUCATIONAL LEADERSHIP, LOS ANGELES, CA.

ALTERNATIVE APPLICATIONS

Step 1: Complete the Epitaph by describing those qualities about yourself that you would like to have placed on your gravestone. (Use Epitaph sheet, Page 19)

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Step 3: Identify in single statement, 3-4 general goals in each of your seven roles which you would like to achieve in the next five-year; one-year periods. Next take these general goals and identify six-month and one-month behavioral objectives by which you can measure your progress toward reaching your goals.

Step 4: Identify those activities you now associate or would like to associate with each role by writing the activity in the next column. Some activities will overlap categories assigned according to the major value area.

Step 5: Now looking ahead, list the activities, tasks, etc. that you need to do next week in each of your 7 "role" areas.

Step 6: Using the ABC Priority System, write a capital A beside those items on the list that have a high value; a B for those with medium value; and a C for low value items. Make certain the A's are accomplished next week. Intersperse the higher-priority items on the B and C lists. Do at least one "A" item daily. That's what it's all about.

Step 7: Next design a model plan for your coming seven days, according to your role priorities listed above. Do not schedule activities too tightly, but rather by major blocks of 1-2 hours in order to achieve something meaningful. Leave gaps for travel, recreation, refreshment breaks, and other "islands" that you require.

ADAPTED FROM ALAN LAKEIN, HOW TO GET CONTROL OF YOUR TIME AND YOUR LIFE

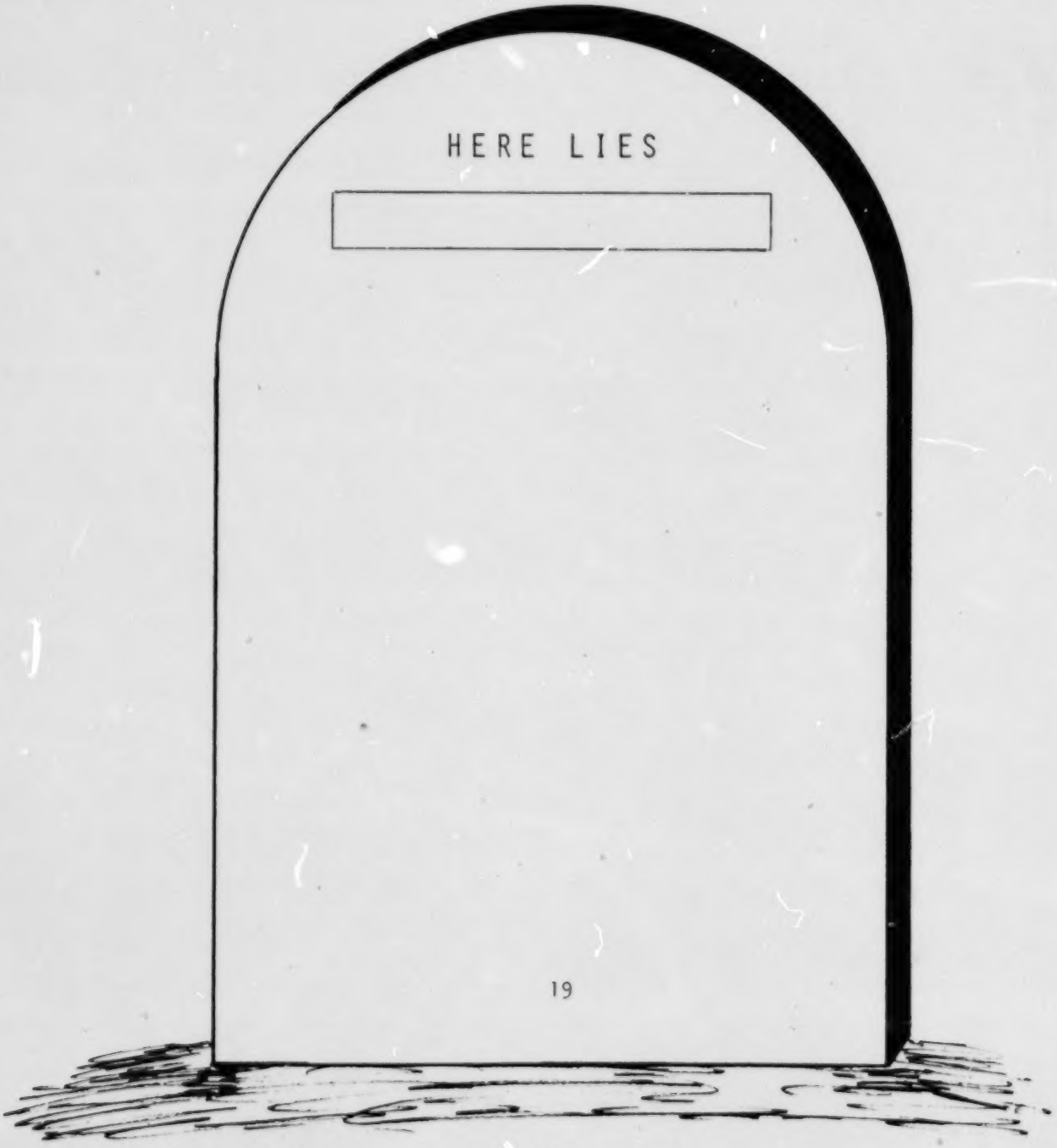
ORGANIZATION APPLICATIONS

IN ORDER FOR PROGRAM MANAGERS' TIME TO BECOME MAXIMALLY EFFECTIVE ON THE JOB, IT IS IMPORTANT THAT A TIME MANAGEMENT PLAN BE DEVELOPED. SUCH A PLAN WOULD CONTAIN MANY OF THE FOLLOWING ELEMENTS:

1. Agreement as to what constitutes an emergency so that a manager can be interrupted during his creative time or planning time.
2. Mutual notification of the time of the day that the respective managers will be doing their planning and will therefore be "inaccessible" to incoming calls and interruptions.
3. Develop and conduct inservice training programs for secretary development.
4. Top-level management support of the concept of input time so that managers of operational programs such as principals or program directors will feel free to be out of the building when appropriate.
5. Budgetary allocations for management training, visitations, and books and periodicals.
6. Development of techniques in cooperation with secretaries and their supervisors in the specific areas of: Visitor control, interruptions, telephone calls, and other procedures because it will enlarge the role of the secretary and save administrator's time.

INTRODUCTION (STEP 1)

IF YOU WERE TO DIE TODAY, DESCRIBE THOSE QUALITIES ABOUT YOURSELF THAT YOU WOULD LIKE TO HAVE PLACED ON YOUR GRAVESTONE.



ROLES

(STEP 2)

ROLES		RANK
SELF SERVICE:	PHYSICAL MAINTENANCE ACTIVITIES SUCH AS EATING, SLEEPING, EXERCISING, PERSONAL CARE, ETC.	
PROFESSIONAL:	YOUR WORK--THAT WHICH BRINGS IN THE MONEY TO SUPPORT YOUR LIFESTYLE.	
FAMILY:	YOUR PARENT ROLE, SPOUSE ROLE, AND SON OR DAUGHTER ROLE.	
SOCIAL-CULTURAL-RECREATIONAL:	ACTIVITIES YOU PARTICIPATE IN WITH FRIENDS, USUALLY FOR ENJOYMENT	
COMMUNITY:	VOLUNTARY POLITICAL OR PHILANTHROPIC ASSOCIATIONS.	
RELIGION OR CHURCH:	RELIGIOUS ACTIVITIES IN WHICH YOU PARTICIPATE.	
PERSONAL:	ACTIVITIES YOU DO ESSENTIALLY ALONE SUCH AS PLEASURE READING, HOBBIES, ETC.	

ADAPTED FROM CENTER FOR EDUCATIONAL LEADERSHIP, LOS ANGELES, CA.

GENERAL GOALS (STEP 3 - APPLICATION)

ROLES	FIVE-YEAR	ONE-YEAR	SIX-MONTH	ONE-MONTH
SELF-SERVICE				
PROFESSIONAL				
FAMILY				
SOCIAL-CULTURAL-RECREATIONAL				
COMMUNITY				
CHURCH				
PERSONAL				

STEP 4 - APPLICATION

STEPS 4,5,6, AND 7 - ALTERNATIVE APP.

ACTIVITY PRIORITIES

SELF-SERVICE	PROFESSIONAL	FAMILY	SOCIAL-CULTURAL-RECREATIONAL	COMMUNITY	CHURCH	PERSONAL

LEGEND: A = HIGH VALUE
B = MEDIUM VALUE
C = LOW VALUE

NAME

WEEKLY SCHEDULE FOR WEEK OF (Step 5-Application) (Step 8-Alt. Appl.)

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
6							
7							
8							
9							
10							
11							
12							
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

NAME

REVISED WEEKLY SCHEDULE (Step 6-Application) WEEK OF

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
6							
7							
8							
9							
10							
11							
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APPENDIX 1

TIME MANAGEMENT EFFECTIVENESS

CHECKLIST

	MEET UNCONDITIONALLY	MEET WITH SOME RESERVATIONS	NEED TO IMPROVE
1. I HAVE WRITTEN GOALS AND OBJECTIVES IN THE SEVEN ROLES OF MY LIFE			
2. I HAVE AN ACTIVITY PLAN FOR EACH OF THE SEVEN ROLES OF MY LIFE			
3. I PERIODICALLY REVIEW MY PROFESSIONAL GOALS AND OBJECTIVES WITH MY EMPLOYER			
4. I SCHEDULE MY HIGH-ENERGY TIME FOR CREATIVE ACTIVITIES			
5. I LEAVE ROOM FOR FLEXIBILITY IN MY DAILY SCHEDULE			
6. I SCHEDULE AT LEAST ONE-HALF HOUR DAILY FOR COGITATING/ MEDITATING			
7. I SCHEDULE AT LEAST FIVE MINUTES AT THE BEGINNING OF EVERY DAY TO PLAN WITH MY SECRETARY			
8. I SCHEDULE PROBLEM SOLVING MEETINGS AT LEAST MONTHLY			
9. I SET DEADLINES AND STICK TO THEM			
10. I PRIORITIZE MY DAILY ACTIVITIES ON AN A-B-C OR SOME-SUCH BASIS			

	MEET UNCONDITIONALLY	MEET WITH SOME RESERVATIONS	NEED TO IMPROVE
11. I DELEGATE AS MUCH AS I CAN --EVEN PARTS OF A TASK IF I CAN'T DELEGATE THE ENTIRE TASK			
12. I MONITOR WHAT I DELEGATE			
13. I PROVIDE TRAINING OPPORTUNITIES AND JOB ENRICHMENT FOR MY SECRETARY			
14. I HAVE SET UP A "QUIET PLACE" FOR MY DAILY PLANNING ACTIVITIES			
15. I HAVE ESTABLISHED PROCEDURES WITH MY SECRETARY FOR HANDLING CORRESPONDENCE, PHONES, AND DROP-IN VISITORS			
16. I TRY TO HANDLE A PIECE OF PAPER NO MORE THAN ONCE			
17. I PROVIDE FOR "CLEANING OUT THE FILES" AT LEAST ONCE A YEAR			
18. I AM IMPROVING MY READING AND LISTENING SKILLS			
19. I SELDOM PROCRASTINATE ON TASKS I NEED TO ACCOMPLISH			
20. I DO NOT PERMIT MY TELEVISION VIEWING TO USURP MY HIGH-PRIORITY ACTIVITIES			

	MEET UNCONDITIONALLY	MEET WITH SOME RESERVATIONS	NEED TO IMPROVE
21. I LOOK UPON COMMUTING TIME OR WAITING TIME AS A "GIFT OF TIME" TO READ, LISTEN TO TAPES, OR OTHERWISE USE PRODUCTIVELY			
22. I SCHEDULE MEETINGS ONLY WHEN APPROPRIATE AND THEN STICK TO THE TIME SET FOR EACH AGENDA ITEM			
23. I PLAN FOR CONTINGENCIES RATHER THAN ALWAYS "PUTTING OUT FIRES"			
24. I LET THE TELEPHONE INTERRUPT MY PLANNING TIME AND CONFERENCE TIME ONLY IN EMERGENCY SITUATIONS			
25. I MAKE CERTAIN THE HIGH-PRIORITY ACTIVITIES IN MY LIFE RECEIVE HIGH-PRIORITY TIME			
26. I DETERMINE IN ADVANCE THE GENERAL OUTLINE OF LETTERS TO DICTATE OR TELEPHONE CALLS TO PLACE			
27. I SAY "NO" TO ALL ACTIVITIES OF A LOW-PRIORITY NATURE WHICH WOULD INTERFERE WITH MY HIGH-PRIORITY ACTIVITIES			

APPENDIX 2

AN EXECUTIVE SECRETARY

BY RUTH GALLINOIT, PRESIDENT
NATIONAL SECRETARIES ASSOCIATION
FOR BUSINESS MANAGEMENT

1. DOES YOUR SECRETARY KNOW THE FULL RANGE OF YOUR RESPONSIBILITIES AND ACTIVITIES IN YOUR ORGANIZATION? DOES SHE UNDERSTAND YOUR PERSONAL GOALS AND AMBITIONS AND HOW THEY FIT IN WITH CORPORATE OBJECTIVES?

2. CAN YOU LEAVE YOUR OFFICE FOR AS MUCH AS THREE OR FOUR WEEKS, CONFIDENT THAT YOUR BUSINESS AND PERSONAL AFFAIRS WILL BE CONDUCTED RESPONSIBLY AND EXPEDITIOUSLY IN YOUR ABSENCE?

3. DOES SHE HELP YOU ORGANIZE YOUR TIME, COORDINATE YOUR APPOINTMENTS AND SCHEDULES, MEET YOUR DEADLINES--ALL WITHOUT NAGGING AND PESTERING YOU? IS SHE HERSELF A WELL-ORGANIZED PERSON?

4. DOES SHE INITIATE, HANDLE AND FOLLOW THROUGH ON PROJECTS WITHOUT YOUR HAVING TO REMIND HER ABOUT THEM?

5. IS SHE COURTEOUS, HELPFUL, RESPECTFUL AND SOLICITOUS OF YOUR BUSINESS ASSOCIATES, VISITORS, CLIENTS AND CUSTOMERS? DO THEY SPEAK OF HER FAVORABLY?

6. IS SHE IMAGINATIVE? CREATIVE? DOES SHE PRESENT ORIGINAL IDEAS FOR YOUR CONSIDERATION? DOES SHE SUGGEST NEW WAYS TO IMPROVE YOUR WORK? HER WORK? DOES SHE SUGGEST NEW SYSTEMS OR PROCEDURES?

7. IS SHE RESOURCEFUL? DOES SHE SHOW INITIATIVE IN GETTING PAST A PROBLEM WITHOUT RUNNING TO YOU WITH HER TROUBLES?

8. DOES SHE MOVE PAPER EFFICIENTLY? CAN SHE TACTFULLY PRY LOOSE PAPERS AND PROJECTS THAT HAVE REMAINED ON YOUR DESK TOO LONG AND THAT OTHER EXECUTIVES ARE WAITING FOR? DOES SHE SHAKE LOOSE DATA OTHER EXECUTIVES ARE HOLDING AND THAT YOU ARE WAITING FOR?

9. ARE HER BASIC SECRETARIAL SKILLS (SUCH AS FILING, STENOGRAPHY, AND TELEPHONE MANNER) BEYOND REPROACH?

10. IS SHE CALM IN A CRISIS? GRACIOUS WHEN TENSION MOUNTS? WHEN THE PRESSURE IS ON AND YOU LOSE YOUR TEMPER OR SELF-COMPOSURE, DOES SHE SHRUG IT OFF AND CONTINUE TO FUNCTION AS WELL AS BEFORE?

11. DO YOU HAVE HER ABSOLUTE LOYALTY AND CONFIDENCE? CAN YOU TRUST HER WITH CONFIDENTIAL INFORMATION, BOTH PERSONAL AND BUSINESS?

12. DOES SHE READ WIDELY AND KNOWLEDGEABLY, BRINGING TO YOUR ATTENTION PUBLISHED ITEMS PERTINENT TO YOUR BUSINESS OR PROFESSIONAL AFFAIRS?

13. IS SHE A VALUABLE SOURCE OF CORPORATE INFORMATION, OBTAINING FACTS THAT WOULD BE DIFFICULT, AWKWARD OR IMPOSSIBLE FOR YOU TO OBTAIN ON YOUR OWN?

14. DOES SHE HAVE A PERSONAL SELF-IMPROVEMENT PROGRAM? DOES SHE ATTEND CLASSES AND LECTURES OR PARTICIPATE IN PROGRAMS THAT ARE MANAGEMENT-ORIENTED? DOES SHE TRY TO LEARN MORE ABOUT YOUR PARTICULAR COMPANY, YOUR PARTICULAR JOB, YOUR CUSTOMERS OR YOUR INDUSTRY?

15. IS SHE ARTICULATE? DOES SHE EXPRESS HERSELF WELL IN SUMMARIZING INFORMATION FOR YOU, BOTH VERBALLY AND IN WRITING? DOES SHE GIVE INSTRUCTIONS CLEARLY AND PRECISELY? DOES SHE KNOW HOW YOU FEEL ABOUT CERTAIN POLICIES OR PRACTICES, AND DOES SHE COMMUNICATE THIS TO OTHERS AS WELL AS YOU DO?

16. DOES SHE WORK EVERY DAY UNTIL HER JOB IS DONE, REGARDLESS OF THE HOUR? DOES SHE WILLINGLY WORK NIGHTS OR WEEKENDS WHEN IT IS NECESSARY?

17. IS SHE A MANAGER IN THE SENSE THAT SHE CAN FARM OUT HER WORK TO OTHERS WHEN NECESSARY? THAT IS, CAN SHE DELEGATE, SUPERVISE AND TAKE RESPONSIBILITY FOR WORK NOT COMPLETED BY HERSELF? CAN SHE TRAIN OR HELP TRAIN OTHER MEMBERS OF YOUR STAFF?

18. CAN SHE HANDLE ROUTINE MATTERS AND PROJECTS FOR YOU ON A DAY-TO-DAY BASIS WITHOUT YOUR INTERVENTION?

19. DOES SHE KEEP TRACK OF VITAL DATES FOR YOU; DATES CELEBRATED BY YOUR BOSS, FAMILY AND CUSTOMERS (ANNIVERSARIES, BIRTHDAYS, RELIGIOUS HOLIDAYS, VACATIONS AND SUCH)?

20. CAN SHE DO BASIC RESEARCH FOR YOU? GATHER INFORMATION FOR A REPORT OR EVEN WRITE A ROUGH FIRST DRAFT?

APPENDIX 3

SUGGESTIONS DEVELOPED BY MANAGERS FOR SECRETARIES AND FOR MANAGERS

MANAGERS

WHAT CAN SECRETARIES DO TO HELP THEIR MANAGER MANAGE HIS/HER TIME BETTER?

- Ensure she gets her five-minute planning time each day (consistent time)
- Keep the office happy (starting immediately)
- Help manager set timelines for major assignments
- Screen appointments to handle as many herself as possible
- Screen materials - check important ones - route others
- Screen phone calls (find out what they are about and answer if possible)
- Screen visitors (other drop-ins)
- Anticipate materials needed for meetings and lay them out
- Have knowledge of recurring things (check last year and anticipate for this year)
- Remind manager of deadlines and target dates and important meetings
- Maintain calendar - avoid overlapping appointments, etc.
- Develop procedure for making appointments
- Evaluate the manager in carrying out agreed-upon procedures
- Keep manager informed - stay a part of the office - sense the environment
- Be aware about contents of what she types, etc.
- Don't argue (share manager's philosophy)
- Be discreet about what she shares (confidentiality)
- Develop needed skills (needs change)
- Know role in decision-making

WHAT CAN THE MANAGER DO TO HELP THE SECRETARY HELP HIM/HER MANAGE HIS/HER TIME BETTER?

- Provide adequate inservice for secretary
- Keep lines of communication open
- Let her know where you're coming from
- Define secretary's role with her
- Communicate to others the role of the secretary
- Give authority with responsibility and back her up
- Don't assume - explain
- Set priorities jointly
- Be decisive so she doesn't keep holding things waiting for the answer
- Set aside planning time with secretary
- Follow up or secretary's suggestions
- Be sensitive to secretary's workload - provide support as needed
- Give secretary feedback - compliments, etc.
- Be aware of difficulty of secretary's job
- Take secretary's job to free her for inservice, etc.
- Make her part of educational staff
- Be consistent in expectations and delegations of tasks to secretary
- Ensure secretary's planning time
- Develop recipe for communicating role of secretary to outside world
- Spend time letting secretary know what's going on

SUGGESTIONS DEVELOPED BY SECRETARIES FOR MANAGERS AND SECRETARIES

SECRETARIES

WHAT CAN SECRETARIES DO TO HELP THEIR MANAGER MANAGE HIS/HER TIME BETTER?

- Set up a block of time
- Keep accurate calendar: For manager - For staff
- Plan for travel time
- Prioritize mail - different folders
- Screening calls
- Screen visitors
- Remind him of appointments
- Keep accurate files and inform manager of information in files
- Have relevant information ready for meetings, etc.

WHAT CAN THE MANAGER DO TO HELP SECRETARY HELP HIM/HER MANAGE HIS/HER TIME BETTER?

- Give secretary block of time (alone)
- Give secretary 15-minute planning time with manager
- Be sure secretary is aware of what's going on; i.e., staff meetings
- Delegate to some other than secretary
- Define role of secretary
- Make staff aware of role
- Give secretary authority to keep manager on schedule
- Share information
- Place your own phone calls
- Written policy and procedures